

NGO MANAGER
ORGANISATIONAL **A**SSESSMENT **T**OOL (**OAT**)

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NGO MANAGER ORGANISATIONAL ASSESSMENT TOOL (OAT)

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Contents

1. Purpose and characteristics of the tool.....	3
2. How to plan and carry out an organisational assessment?.....	4
3. Doing a SWOT analysis: Strengths, Weaknesses, Opportunities and Threats.....	5
3.1 SWOT Brainstorming.....	5
3.2 SWOT Action Plan.....	6
Worksheet #1: Organisational Assessment - Question Menu.....	8
Worksheet #2: SWOT Analysis – Brainstorming Sheet	21
Worksheet #3: SWOT Analysis – Action Plan Sheet	22
Worksheet #4: Organisational Assessment Summary Sheet.....	23
Useful References.....	24

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1. Purpose and characteristics of the tool

The purpose of the Organisational Assessment Tool (OAT) is to help organisations to improve their performance. It helps to find out their strong and weak points. The OAT is a learning tool on problems and questions concerning the organisation's strategy, its management processes, finances, staffing, relationships with others and its results. It asks to identify causes of problems and helps in the decision-making to overcome them.

Assessment tools are also important for consultants and support organisations, which help NGOs to build their capacity. Ideally, an organisational assessment is carried out periodically to measure change and improvement.

The tool is simple, task-focused and action-oriented. The statements of the questionnaire describe the expected capacity of a "mature" or developed organisation.

The characteristics of the OAT are as follows:

- Contains a comprehensive list of relevant management issues
- Promotes process-orientation instead of static listing of positive and negative points. The OAT focuses on identifying strengths, weaknesses, opportunities and threats with regard to each issue (SWOT analysis)
- Helps to focus on causes of problems instead of highlighting symptoms only
- Favours a participatory approach for the assessment, dialogue and transparency on its results. It can be used both by an individual and by groups.
- Leads to qualitative statements instead of giving grades
- Includes a detailed results section, which asks what the organisations achievements are
- Provides users with quick overview of level of achievement for each management issue
- Results in a clear list of priority subjects for improvement for each issue analysed
- Facilitates the setting up of a plan of action
- Contains easy-to-use worksheets, which can also be used to report on the results of the assessment.

Many of the existing assessment tools are difficult to adapt and modify because they are in PDF or HTML format that cannot be modified if downloaded. The OAT worksheets can be downloaded as Microsoft Word file and thus be adapted to your particular needs (see <http://www.ngomanager.org/tools.htm>). This is important because each organisation faces different management challenges and needs to adapt the tool to its particular situation: a newly established organization will need to build up the foundations of the NGO and have to pay more attention to its governance structure, the board, the leadership system and accounting. An established and somewhat developed organisation may need to put particular emphasis and work on its human resources and planning systems. Mature organisations may focus on assessment, change and management processes. Therefore each assessment manager will need to be able to adapt the assessment tool to the organisation's particular needs at that moment, selecting certain issues, deleting others and thus creating its own tool.

The OAT is conceived as an open source instrument. You are free to use it and to adapt it to your needs. We would very much appreciate if you could send us your comments and suggestions to improve the tool either directly on the template or in a separate email. Contributions will be acknowledged and mentioned at the NGO Manager's website (in case you do not object).

2. How to plan and carry out an organisational assessment?

There are three steps for such an assessment:

Step 1: Prepare the assessment

- Define the scope of the assessment: choose between carrying out a comprehensive assessment, ie. answering all of the questions in the Question Menu, or a selective assessment, ie. selecting the topics which are the most important to your organisation at this time.
- Adapt the Question Menu to suit your specific needs. This tool is easy to edit because all the worksheets are in a commonly used and downloadable format (Microsoft Word).
- Decide on who among managers and staff will participate in the assessment. Decide whether an internal assessment manager or an external facilitator is best suited to lead the assessment process.
- Decide on the form and timing of the enquiry: structured or semi-structured interviews, team-based discussions, etc.

Step 2: Carry out the assessment

- Answer the questions in the [Question Menu](#) according to the methodology you have chosen in step one.
- For each question, determine your level of achievement, the key recommendations and their level of priority and record the answers on the Question Menu.

You now may have a good overall picture of the current capacity of your organisation. You also have established recommendations for capacity-building. The next step is to set up a plan of action to implement these recommendations. The plan of action should take into account internal as well as external factors. Identifying internal strengths and weaknesses, and external opportunities and threats, or SWOT analysis, is the assessment's key tool to create the plan of action:

Step 3: Create a plan of action

- Do a SWOT a for each of the questions using the SWOT [Brainstorming Sheet](#). Brainstorming is most productive in a group.
- Identify relevant actions to be taken based on the results of the SWOT analysis using the SWOT [Action Plan Sheet](#).
- Use the [Summary Sheet](#) to present your plan of action.

3. Doing a SWOT analysis: Strengths, Weaknesses, Opportunities and Threats

SWOT analysis is an effective, simple and widely used tool. It can be carried out individually and in groups. The organisation's internal situation is described under the headings of strengths and weaknesses. The external factors are condensed under the headings of opportunities and threats. To complete a comprehensive overview, the main causes for each factor should be identified, whenever it is useful and feasible.

A SWOT analysis is needed for each sub-topic of the questionnaire. The analysis and discussions can be carried out in two steps:

3.1 SWOT Brainstorming

The purpose of the SWOT brainstorming is to identify and list the key issues at stake and underlying causes. Group sessions are very often most effective for that purpose. In preparation of SWOT group sessions, it is useful to ask

participants to prepare in advance his or her own SWOT analysis. The results of individual analysis can then be merged during the group session.

SWOT analysis usually stimulates a multitude of different views. These should be recorded in the group's SWOT brainstorming notes and can be weighed, if needed. The purpose of this exercise is not to produce consensus on all of the issues, at all cost, but to identify a wide range of factors which generally form the causes of complex issues. It may even be counterproductive to cut down the richness of differing opinions to a few points, which are commonly agreed.

Table 1

	Internal	
	Strengths	Weaknesses
Internal	<ul style="list-style-type: none"> • Available resources • Skills you have and which are necessary to achieve your objectives • Capabilities • Other advantages, eg. in comparison to other organisations • Indicate main causes 	<ul style="list-style-type: none"> • Lack of resources (financial, human, etc.) • Lack of skills • Lack of capabilities • Disadvantages, eg. in comparison to others • Lack of organisational infrastructure • Indicate main causes
	External	
	Opportunities	Threats / constraints
External	<ul style="list-style-type: none"> • Chances you may have due to policy change of government, funders and other stakeholders • Trends • Events such as workshops where you can explain your programmes and projects • Indicate main causes 	<ul style="list-style-type: none"> • Obstacles • Increased competition from other organisations • Continued over-spending / under funding • Indicate main causes

Using SWOT analysis is helpful and stimulating if you wish to compare your organisation to one or several other organisations that are active in the same field. While you may not obtain as many details as for your own organization, a SWOT comparison tells you what you do know, highlights what you do not know and helps to learn from others thereby enhancing the SWOT analysis made of your own organization.

3.2 SWOT Action Plan

After identifying key strengths, weaknesses, opportunities and threats, the results should be linked to each other in order to create the detailed plan of action for each topic. Use the SWOT [Action Plan Sheet](#):

1. Take all the strengths you have identified and their causes and divide these into potential opportunities and threats

2. Take all the weaknesses you have identified and their causes and divide these into potential opportunities and threats

Table 2

Topic: ...	Strengths	Weaknesses
Opportunities	Capitalize on these points: • •	Improve these: • •
Threats	Monitor these points: • •	Eliminate these: • •

3. Eliminate weaknesses that threaten your organisation
4. Capitalize on the opportunities that are your organisation's strengths
5. Improve weaknesses that may contain opportunities
6. Monitor areas where your organisation is strong but is challenged by potential threats
7. Use the OAT [Summary Sheet](#) to present your plan of action.

OAT Worksheets

Worksheet #1: [Question Menu](#)

Worksheet #2: SWOT - [Brainstorming Sheet](#)

Worksheet #3: SWOT - [Action Plan Sheet](#)

Worksheet #4: Organisational Assessment [Summary Sheet](#)

Worksheet #1: Organisational Assessment - Question Menu

Management subject	Objective	Level of achievement*	Level of priority: Top/ medium/ low	Recommendations
1. Governing Structure				
1.1 Mission, Vision Statements and Values	The Mission, Vision Statements and Values are available. They: - Guide the design of the organisation's strategic aims and objectives; - Are communicated with the staff in ways that they are able to share these with the main stakeholders and the general public.			
1.2 Statues	- The organisation's legal framework is reflected in its statutes. - The statues include admission criteria for membership, rights and duties of its members.			
1.3 Board	The board participates in defining policies, fund raising campaigns, advocacy and public relations.			
	The responsibilities and decision making authority of the board are known to the staff, and expressed to the general public and stakeholders.			
	The respective roles and responsibilities of the board directors and senior management are clearly defined.			
	The board composition includes members who are recognized for their leadership in their respective field of activities.			
	- Procedures exist and are applied to facilitate and encourage board members to contribute to the organisation's development. - Board Members actively demonstrate their leadership.			
	Board members are representatives of stakeholders, and are able to present a wide range of interests held by stakeholders.			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Management subject	Objective	Level of achievement*	Level of priority: Top/medium/low	Recommendations
2. Management Processes				
2.1 Process Orientation	<ul style="list-style-type: none"> - The organisation continuously strives to improve its processes and has developed appropriate strategies and resource tools to encourage creativity, implement and communicate improvements consistently and reward useful proposals. - There is a policy on change management that facilitates and promotes organizational change. Strategies for change are permanent features of the leadership agenda. - Periodical reviews of management practices are part of organisational self-assessments. 			
2.2 Organisational chart and staff access to leaders	The organisational chart defines individual responsibilities and is accessible to members and stakeholders.			
	Leaders are easily accessible to their staff.			
2.3 Meetings, teamwork and knowledge management	Each level of the organisation (department, division) identifies it's needs for one of the three purposes of meetings: (1) information exchange, (2) debate and brainstorming of specific themes, (3) decision-making			
	An agenda is available and communicated in advance, thus enabling participants to prepare the meetings.			
	Decisions taken during meetings are communicated (minutes of meeting) and followed up.			
	Leaders and participants regularly assess the quality of meetings.			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Management subject	Objective	Level of achievement*	Level of priority: Top/ medium/ low	Recommendations
	Teamwork is promoted to achieve objectives.			
	Important knowledge is collected, appropriately stored (on paper or electronically), shared in an appropriate way and used to achieve organisational objectives.			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Management subject	Objective	Level of achievement*	Level of priority: Top/medium/low	Recommendations
2.4 Planning	<ul style="list-style-type: none"> - The organisation has a policy that facilitates planning, monitoring and self-assessment effectively. - The annual plan is clearly defined as the responsibility of senior management. Senior Management is responsible for facilitating the planning sessions in which a plan is developed that identifies the individuals responsible for particular areas of work, the tasks, a process and the timing. 			
	Trained personnel are responsible for the planning, monitoring and self-assessment unit.			
	The development of strategy and objectives are derived from the organization's mission context.			
	Objectives are SMART and permit accurate budgeting (SMART means S pecific, M easurable, A chievable, R elevant for the beneficiaries/clients, and T ime-bound, ie. indicating given time-frames).			
	Planning processes include consultations with beneficiaries/clients.			
	An annual plan is established that contains: <ul style="list-style-type: none"> - Long and medium-term objectives (long-term: over 3 years), medium-term 1-3 years (duration depends on context) - A strategy that takes into account constraints that are relevant to the success of established objectives - Short-term objectives (up to 1 year) - Indicators to measure progress (results that were identified) towards the achievement of the objectives. 			
	<ul style="list-style-type: none"> - The annual plan indicates the human, financial and material resources that are essential if the organization is to achieve its objectives according to its strategy and plan. - It identifies the risks that may prevent the organization from achieving its objectives if some of its resources are inadequate. 			
	The annual plan is a realistic work plan of what is to be done, how, when and by whom.			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Management subject	Objective	Level of achievement*	Level of priority: Top/ medium/ low	Recommendations
2.5 Implementation of work plan and monitoring of progress achieved	- To measure progress achieved against stated objectives, the organisation has a monitoring system and an adequate set of indicators. – There are clear procedures for monitoring (which data is to be collected, how, by whom, for whom).			
	Progress achieved against stated objectives is routinely checked and reported to the appropriate level of the hierarchy.			
	Monitoring helps to improve services, products and performance. It is carried out through: Surveys, interviews, focus groups, questionnaires and through mechanisms that will help to track beneficiary/client feedback on: - Quality of services provided - Analysis of complaints received - Suggestions made for improvement.			
	- Results of the monitoring process are analysed. They are shared and discussed with managers and staff members concerned (lessons learned- what has been successful and what are the challenges to overcome). – The planning and implementation process is modified accordingly. – Lessons learned and good practices are made available to other managers and staff, and to other units/departments; challenges are tracked for future action.			
2.6 Reporting and information exchange	- There is a policy on internal and external reporting and information exchange. It is effectively employed and regularly assessed with the help of all those involved in the writing and use of such reports. – Reporting requirements are clearly defined for each unit or section of the organisation.			
	- The organisation regularly provides factual reports to stakeholders adapted to their needs. - The stakeholders' needs for activity and results reports as well as their feedback on the quality of reports are regularly assessed and the reporting format is adapted accordingly.			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Management subject	Objective	Level of achievement*	Level of priority: Top/medium/low	Recommendations
3. Human Resources				
3.1 Human resources policy and development	<ul style="list-style-type: none"> - The organisation has a human resources policy, a training and development plan, staffing policies and regulations, which respect national labour legislation. These policies and regulations are recorded in a manual and made accessible to the staff. - Human resources policy, training and development plan and staff regulations are effectively employed, regularly monitored and modified, if necessary. 			
	Selection criteria for staff and volunteers and the recruitment process are fair: they are based on the candidate's qualifications, correspond to the requirements of the job and are in accordance with the organisations' values and beliefs. They are transparent and well communicated.			
	The organisation is inclusive of women and minorities.			
	<ul style="list-style-type: none"> - Job descriptions accurately describe the tasks and skills required. - Job descriptions are discussed between the employee and the superior and updated whenever necessary. - Job descriptions are modified in accordance with a defined procedure. - A job classification system permits standardised jobs and skills required. 			
3.2 Human resources unit	The human resources unit is led by a human resources specialist.			
	An adequate budget is available for human resources training and a development plan.			
	<ul style="list-style-type: none"> - For each employee and volunteer, a personnel file is established (containing personal data, work history, information on salary development, promotions, etc.). - Every employee has unrestricted access to his/her own personnel file for consultation. 			
3.3 Staff numbers	There are adequate human resources for the successful completion of programs and projects.			

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Management subject	Objective	Level of achievement*	Level of priority: Top/ medium/ low	Recommendations
3.4 Promotions	All employees have a fair opportunity for promotion. Promotional opportunities are advertised and clearly identify the work and skills required.			
3.5 Salaries and other benefits	A compensation package is guided by a policy and guidelines (salary scale, insurance, health care, pension fund, other financial and material benefits). It is regularly assessed. Salaries and benefits correspond at least to those of comparable NGO's in the country/region, or are better.			
3.6 Incentives and rewards system	- All staff know the organization's program of rewards and benefits. - The program is effectively employed, regularly assessed and adapted, if necessary.			
3.7 Performance appraisal	- Annual appraisals are mandatory for all employees and volunteers. - Performance appraisals for teams are jointly carried out by team members and their leaders.			
	Staff members and volunteers carry out performance appraisals of their superiors.			
3.8 Training	- There is a staff training policy and all staff members are able to participate in internal or external training programs. - The organisation actively supports skill development for all of its staff and volunteers.			
	Training needs and requests are identified at the employee appraisal time and agreed to at that time.			
	Leadership training is available to managers to sustain leadership qualities.			
	- Leaders participate in the training of their staff. - Mentorship training is part of the leadership training.			
	A learning culture is promoted by training staff how to learn and by providing them with appropriate facilities and opportunities to exchange professional experiences (good practises, lessons learned).			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Management subject	Objective	Level of achievement*	Level of priority: Top/medium/low	Recommendations
3.9 Complaints and performance problems	Staff recourse procedures for complaints and performance problems are available and known by all staff members and volunteers. These are effectively employed.			
3.10 Staff representation	To promote employee and management satisfaction, employees and volunteers have effective representation for labour problems, for instance through union activities, representation at leadership meetings and through the participation in internal debates.			
4. Financial resources & administration				
4.1 Registration	<ul style="list-style-type: none"> - The organisation is accurately registered if required by the appropriate local, national and international legislation and regulations. - The organisation respects laws, policies and regulations that are applicable to NGOs. 			
4.2 Economic and fiscal environment	<ul style="list-style-type: none"> - The organisation has access to resources and funding (allocations) provided by the government authorities, funding agencies and civil society stakeholders. - The organisation is granted financial and fiscal benefits that are relevant to its legal status. 			
4.3 Budgeting	The financial resources unit is led by a person trained for that purpose.			
	Services, projects and programs are defined with relevant financial requirements: Each has its own funding and cross-project financing is avoided.			
	Budgets are included in project management and can be adjusted when necessary.			
	There are guidelines on excess costs (i.e. costs that exceed the budget as planned).			

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Management subject	Objective	Level of achievement*	Level of priority: Top/medium/low	Recommendations
4.4 Funding	There are multiple sources of funding which help to diversify the organisation's agenda over longer periods of time.			
	There is a plan to diversify funding and to access additional resources.			
	The fundraising ratio is improving (cost of one currency unit raised).			
	The number of important regular donors is increasing in order to reduce a dependency on the same donors.			
4.5 Accounting	Guidelines and procedures are available and employed for <ul style="list-style-type: none"> - authorising and controlling expenditures - recording and reporting of financial information. 			
4.6 Cost-efficiency	Purchases are carried out through competitive pricing and transparent comparison of several offers.			
	Services, project and program outputs are regularly checked for cost-efficiency.			
4.7 Accountability	<ul style="list-style-type: none"> - Annual internal and external audits are carried out. - Results of audits are made available to all concerned. 			
4.8 Financial reporting	Regular internal and external financial reporting is carried out (eg. monthly, quarterly, annual, as appropriate).			
	Financial reports are used to review budget plans.			
	Financial reports can be made easily available to senior management and donors.			
4.9 Administrative procedures	<ul style="list-style-type: none"> - There is an administrative manual, which is updated whenever there are changes (internal procedures, forms, filing, purchases, stock keeping, etc.). - Staff has access to the administrative manual. 			
	<ul style="list-style-type: none"> - Internal memos, correspondence, reports, etc. are systematically filed in an appropriate system 			
	<ul style="list-style-type: none"> - Such files and records are available to all concerned. 			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Management subject	Objective	Level of achievement*	Level of priority: Top/medium/low	Recommendations
4.10 Infra-structure	Offices are adequately equipped with furniture, lighting, sanitary installations and other equipment.			
	Offices are adequately equipped with information technology (telephones, fax, computers, software, etc.).			
	An inventory of material, equipment and assets is maintained and regularly updated.			
5. Relation-ships				
5.1 Social & cultural environment	The social and cultural environment, values and beliefs guide the development of the organisation.			
5.2 Stakeholder engagement	- The main stakeholders are identified (eg. beneficiaries, clients, employees, donors, other organisations, research institutes, the private sector, government agencies, media, general public, etc.). - Services, projects and programs reflect the needs of main stakeholders.			
	- The organisation establishes particular times when consultations are organized with major stakeholders to promote debate on policy issues, advocacy, needs assessment, funding, project design, implementation, monitoring and impact assessment. - The result of such dialogue is integrated into the management planning process.			
	The organisation establishes particular times when consultations are organized with its beneficiaries/clients.			
	Information on the organisation's activities and results are shared with stakeholders through newsletters, annual reports, particular events.			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Management subject	Objective	Level of achievement*	Level of priority: Top/medium/low	Recommendations
5.3 Partnerships with other NGOs, networks, companies, government authorities	<ul style="list-style-type: none"> - There is a policy that promotes partnerships, e.g. through sharing certain resources, learning from others, developing synergies. - This policy is communicated within the organisation, effectively employed and regularly assessed. 			
	<ul style="list-style-type: none"> - Civil society organisations are able to participate in the government's decision-making process. - The government is responsive to issues raised by civil society organisations. 			
5.4 Media	A media policy and strategy is in place, employed and regularly monitored and evaluated.			
	The media unit is led by a person who has received training for that purpose (eg. spokesperson).			
6. Results				
6.1 Results achievement	Delivery of services and results correspond to annual or project objectives (quantitative and qualitative assessment).			
	<ul style="list-style-type: none"> - Quality and reliability of service, project and programme output correspond to objectives - Results are sustainable. 			
	Innovations and improvements are recorded and shared as appropriate.			
	A detailed analysis on constraints is provided if the results do not correspond to objectives.			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Management subject	Objective	Level of achievement*	Level of priority: Top/ medium/ low	Recommendations
6.2 Stakeholder satisfaction	Main stakeholders are satisfied with the organisation's services, projects and programs (stakeholder surveys, rating of service quality, compliments and complaints analysis). - Stakeholder feedback is shared and communicated within the organisation. - Stakeholder feedback is used to improve and modify the implementation and planning process.			
6.3 Financial results	- Financial targets and budgets are met. - Services, project and program outputs are cost-efficient.			
	- Accounts are audited. - Stakeholders are informed about financial results.			
	Stakeholders are satisfied with financial results.			
6.4 Human Resources results	Staff and volunteers are satisfied with (check through surveys, questionnaires): - Salaries, benefits and other services to staff - Policy and administrative issues - Leadership - Recognition of individuals and teams - Empowerment and equal opportunities policies and their implementation - Training opportunities and career development			
	Staff are motivated (check quality and quantity of improvements suggested, absenteeism, sickness and accidents levels, grievances, staff turnover).			
	Staff satisfaction of organisation's role: - for main stakeholders and other civil society actors - in the community and society			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Management subject	Objective	Level of achievement*	Level of priority: Top/ medium/ low	Recommendations
6.5 Impact on society	Media coverage			
	Quality of relationships with relevant government authorities			
	Quality of partnerships with other organisations and companies			

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Worksheet #2: SWOT Analysis – Brainstorming Sheet (Strengths, Weaknesses, Opportunities, Threats)

Topic: ...	Strengths	Weaknesses
Internal	<p>Note main resources and skills, capabilities, other advantages, etc., and indicate main causes:</p> <ul style="list-style-type: none"> • ... 	<p>Note lack of resources, lack of skills, lack of capabilities, other disadvantages, etc., and indicate main causes:</p> <ul style="list-style-type: none"> • ...
	Opportunities	Threats / constraints
External	<p>Note chances you may have due to policy changes, trends, etc., and indicate main causes:</p> <ul style="list-style-type: none"> • ... 	<p>Note obstacles, increased competition, lack of funding, etc., and indicate main causes:</p> <ul style="list-style-type: none"> • ...

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Worksheet #3: SWOT Analysis – Action Plan Sheet (Strengths, Weaknesses, Opportunities, Threats)

Topic: ...	Strengths	Weaknesses
Opportunities	<p>Capitalize on these points:</p> <ul style="list-style-type: none"> • ... 	<p>Improve these:</p> <ul style="list-style-type: none"> • ...
Threats	<p>Monitor these points:</p> <ul style="list-style-type: none"> • ... • ... 	<p>Eliminate these:</p> <ul style="list-style-type: none"> • ... • ...

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Worksheet #4: OAT Summary Sheet

Management subject	Recommendations	Plan of action	Priorities 1-4 for implementation 1 - to be resolved in up to three months; 2 - three to six months; 3 - six months to one year; 4 - more than one year

* Level of achievement: A=not yet started; B=some progress; C= considerable progress; D= achieved

Useful References

European Foundation for Quality Management: *Assessing for Excellence – A Practical Guide for Self-Assessment*, Brussels 1999, 58 p.

European Foundation for Quality Management: *The EFQM Excellence Model - Public and Voluntary Sectors*, Brussels 1999, 41 p.

Levinger, Beryl; Bloom, Evan: "Discussion-Oriented Organizational Self-Assessment (DOSA)", *The DOSA Page, New Directions in Organizational Capacity Building*, <http://www.edc.org/GLG/CapDev/dosapage.htm>.

Levinger, Beryl; Bloom, Evan: "Participatory Organizational Evaluation Tool (POET)", <http://www.undp.org/csopp/poet.htm>. The user manual can be found at http://www.aidsalliance.org/resources/220_POET.doc, 66 p.

The Organisational Self-Reflection Project (OSR) provides a comparison of 12 well-known assessment tools for NGO's. OSR is a joint effort from Fundación Acceso, Universalía Management Group and International Development Research Centre (IDRC), http://web.idrc.ca/uploads/user-S/10391492500final_report_prepared_by_Universalia.doc, 56 p.

Tiffany, Paul; Peterson, Steven D.: *Business Plans for Dummies*, IDG Books, Foster City (USA) 1997, 354 p.

VanSant, Jerry: "A Composite Framework for Assessing the Capacity of Development Organizations", *Manage for Results, Network for International Development*, http://www.manageforresults.com/JV_framework.pdf, 7 p.

USAID Center for Development Information and Evaluation: „Measuring Institutional Capacity“, *Recent Practices in Monitoring and Evaluation Tips, Number 15, 2000, annexes* http://www.dec.org/pdf_docs/pnacg624.pdf. Describes several assessment tools which are difficult or impossible to find elsewhere, such as:

ibid. „Institutional Development Framework (IDF)“, developed by Management Systems International, see also http://www.msiworldwide.com/gral/nwproductsinfo/institutional_dev.htm

ibid. „Organisational Capacity Assessment Tool (OCAT)“, developed by PACT, <http://www.pactworld.org/>. For information on PACT's assessment tool „Organizational Capacity Assessment (OCA)“, see http://www.pactworld.org/services/oca/oca_services.htm#tool_design.

The Manager's Electronic Resource Center (ERC): "Human Resource Development (HRD) Assessment Instrument for Non-Governmental Organisations (NGOS) and Public Health Sector Health Organisations", *The Health Manager's Toolkit*, <http://erc.msh.org/mainpage.cfm?file=7.40.htm&module=Toolkit&language=English>, 16 p.

Web sites mentioned above were last accessed on 3 July 2004.
